

Pega Customer Relationship Management

INSTALLATION GUIDE

For Pega Customer Service and Pega Sales Automation

7.22



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Overview

Pega Customer Relationship Management (Pega CRM) is a product suite that includes Pega Customer Service and Pega Sales Automation. Pega CRM provides a single installer for both the components, but the applications are licensed separately to use.

Note: If you have purchased the licenses of both the component applications (Pega Customer Service and Pega Sales Automation), then you can enable them in one single installation.

Prerequisites

Ensure that the following prerequisites are met before you start your installation:

- Verify that you can start and stop your application server.
- Install Pega 7 Platform 7.2.2 or higher and then verify your installation as described in the *Pega 7 Platform Installation Guide* for your environment, available on the [Deployment Guides page](#).
- Review the language packs applicable to your product.
- Apply any hotfixes that are required specifically to support the Pega CRM application before continuing with the Pega CRM installation. For the list of these required hotfixes, see the table of required Pega CRM hotfixes available on the PDN here: <https://pdn.pega.com/pega-crm-hotfixes>
- Update the Pega 7 Platform online help to the latest version from the **Online Help Files** section on the [Pega 7 Platform Update](#) page. After you download the latest **prhelp.war** file, deploy it in your Pega 7 Platform installation before continuing. For deployment information, see the [Pega 7 Platform Installation Guide for your application server](#).

Installing the application

Complete the following steps to install the application.

Importing the application bundle

1. Log in to the Pega 7 Platform (<http://<hostname>:<port>/prweb>) using the following credentials:
User Name: administrator@pega.com
Password: install or new client specified password
2. Click **Designer Studio > Application > Distribution > Import**.
3. Click **Choose File** and browse for the **Rules\PegaCRM_722.jar** file from the media image, and then click **Next**. Click **Next** to import the JAR file containing rules and other application objects. When the progress bar reaches 100%, the import process is completed.
4. Verify the total error count and contact Pega Customer Support to resolve them. If there are no errors, click **Done**.

Optional: Importing the sample data

Pega Customer Relationship Management provides sample data as a reference for site specific implementations. This data is used only to test your installation.

1. Log in to Designer Studio.
2. Click **Designer Studio > Application > Distribution > Import**.
3. Click **Browse** and select the following files (separately) to upload from your distribution media.
 - **SampleDB/PegaCRMSample_DDL.jar**
 - **SampleDB/PegaCRMSample_DML.jar**
4. After the files are uploaded; for each file, select the file and click **Next** to import the file.
5. Follow the on-screen instructions to upload and import the sample database files.

Note: For a multi-tenancy sample import, ensure that **SampleDB/PegaCRMSample_DDL.jar** file is imported in the shared layer and **SampleDB/PegaCRMSample_DML.jar** file is imported in the tenant layer

Verifying your installation

Verify that the Pega Customer Relationship Management installation is successful with all the required rulesets for both Pega Customer Service and Pega Sales Automation.

Pega Customer Service and Pega Sales Automation component applications are built on another application PegaCRMBase. The following PegaCRMBase ruleset stack is common for both the applications.

PegaCRM-Base:07-22

PegaMKT-Integration:07-22

PegaFW-NewsFeed:07-22

Verifying Pega Customer Service ruleset stack

1. Log in to the application using the following credentials:

User Name: casysadmin

Password: install

2. Click **Designer Studio > Application Structure > Ruleset > Stack.**
3. Verify that the following ruleset versions are displayed in the order listed.

PegaCS-Localization:07-22

CustomerService-Dialog:07-22

SAforCS:07-22

PegaCS-Advisor:07-22

PegaCS-AdvisorReporting:07-22

PegaMKT-Advisor:07-22

CPM:07-22

CPM-Reports:07-22

PegaAppCA:07-22

PegaKM:07-22

KMReports:07-22

PegaApp:07-22

PegaFW-Chat:07-22

PegaFW-CTI:07-21

PegaFW-ChannelServices:07-21

CPM-PegaNPS:07-22

PegaFW-NPS:07-22

UI-Kit-7:08-01

SA-Artifacts:07-22

SA-LocalCampaigns:07-22

PegaSA-Advisor:07-22

PegaCRM-SFA:07-22

PegaCRM:07-22

PegaCRM-EmailIntegration:07-22

PegaCRM-Social:07-22

PegaCRMFW-Email:07-22

PegaCRMFW-GoogleAPI:07-22

PegaFW-EWSIntegration:07-22

PegaFW-LandingPages:07-22

PegaFW-Gadgets:07.22

PegaFW-CED:07-22

PegaFW-Outlook:07-22

Pega-LP_CPM:07-22

Pega-Chat:07-22

Pega-CTI:07-21

Pega-ChannelServices:07-21

Verifying Pega Sales Automation ruleset stack

1. Log in to the application using the following credentials:

User Name:sfasysadmin

Password:install

2. Click **Designer Studio > Application Structure > Ruleset > Stack.**
3. Verify that the following ruleset versions are displayed in the order listed.

CSForSA:07-22

SA-Artifacts:07-22

SA-LocalCampaigns:07-22

PegaSA-Advisor:07-22

PegaCRM-SFA:07-22

PegaCRM:07-22

PegaCRM-EmailIntegration:07-22

PegaCRM-Social:07-22

PegaCRMFW-Email:07-22

PegaCRMFW-GoogleAPI:07-22

PegaFW-EWSIntegration:07-22

PegaFW-LandingPages:07-22

PegaFW-Gadgets:07-22

PegaFW-CED:07-22

PegaFW-Outlook:07-22

PegaMKT-Advisor:07-22

UI-Kit-7:08-01

PegaCS-Localization:07-22

CustomerService-Dialog:07-22

PegaCS-Advisor:07-22

PegaCS-AdvisorReporting:07-22

CPM:07-22

CPM-Reports:07-22

PegaAppCA:07-22

PegaKM:07-22

KMReports:07-22

PegaApp:07-22

PegaFW-Chat:07-22

PegaFW-CTI:07-21

PegaFW-ChannelServices:07-21

CPM-PegaNPS:07-22

Pega-LP_CPM:07-22

Pega-Chat:07-22

Pega-CTI:07-21

Pega-ChannelServices:07-21

Note: If you encounter errors while verifying, your installation is unsuccessful. Repeat the installation steps again. For more information to view errors and warning, and to use the Log files, refer [Log Files tool](#).

Configuring additional components

For your application to work as expected, you must configure the following additional components alongside your installation.

Integrating with Pega Customer Decision Hub

To use Customer Decision Hub features in Pega CRM, you must first install the licensed version of your Customer Decision Hub application, and then configure the application with Pega CRM application. For more information on how to configure and use Customer Decision Hub features, see Integrating with [Pega Customer Decision Hub](#) on PDN.

Note: Customer Decision Hub component is licensed separately.

Integrating with Microsoft Outlook 2013 Add-In in Pega Sales Automation.

Pega for Outlook seamlessly integrates with Microsoft Outlook 2013 to help increase sales by allowing the users to send emails and track conversations using Microsoft Outlook. For more information on how to integrate, see [Integrating Pega Sales Automation with Microsoft Outlook](#) on PDN.